

HRC

Potential FY 2018 Focus Areas

- Employee Development/Retention
- Support for First Line Supervisors
- Workforce Planning
 - Succession Planning
 - EPA's Workforce After VERA/VSIP
 - Workforce of the Future
- Working with the Unions to Manage Employee Stress and Organizational Change During Transitions



Voluntary Early Retirement and Voluntary Separation Incentive Authorities

April 2017



What is Voluntary Early Retirement Authority ?

VERA (or Early-Out) allows agencies that are undergoing substantial restructuring, reshaping, downsizing, transfer of function or reorganization to temporarily lower the age and service requirements in order to increase the number of employees who are eligible for retirement.

- Encourages voluntary separations and helps the agency complete the needed organizational change with minimal disruption to the work force.
- Eligible employees receive an immediate annuity years before they would be otherwise eligible.
- Use of the authority requires OPM approval.



VERA Eligibility

The employee must:

- Meet the minimum age and service requirements and be:
 - At least age 50 with at least 20 years of creditable federal service, or
 - Any age with at least 25 years of creditable federal service;
- Have served in a position covered by the OPM authorization for the minimum time specified by OPM (usually 30 days prior to the date of the agency request);
- Serve in a position targeted by the agency's VERA plan; and
- Separate by the close of the early-out period.



What is Voluntary Separation Incentive Payment?

VSIP (or Buy-Out) allows agencies that are downsizing or restructuring to offer employees lump-sum payments up to \$25,000 as an incentive to voluntarily separate.

- May be offered to employees who are in surplus positions or have skills that are no longer needed in the workforce and who volunteer to separate by resignation, optional retirement or by voluntary early retirement.
- Some employees may be eligible for VERA and VSIP and can take both (i.e., retire early with a lump-sum incentive).
- Use of the authority requires OPM approval.



VSIP Eligibility

The employee must:

- Be serving in an appointment without time limit;
- Be currently employed by the executive branch of the federal government for a continuous period of at least 3 years;
- Be serving in a position covered by the agency VSIP plan (i.e., in the specific geographic area, organization, series and grade); and
- Apply for and receive VSIP approval.



VSIP Ineligible

- Reemployed annuitants;
- Eligible for disability retirement;
- Have received a decision notice of involuntary separation for misconduct or poor performance;
- Previously received any VSIP from the federal government;
- Recipient of a student loan repayment during the 36-month period preceding the date of separation;
- Recipient of a recruitment or relocation incentive during the 24-month period preceding the date of separation; and
- Recipient of a retention incentive during the 12-month period preceding the date of separation.



VERA and VSIP ARE NOT

- A short-term solution for budget cuts; the focus of your business case should be on addressing shifts in agency priorities.
- For positions that have direct hire authority or are paying recruitment incentives, e.g. IT Specialist (Information Security).
- To be used to deal with employees with performance or conduct issues.

[DateTime]

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JUSTIFICATIONS MUST INCLUDE:

- Detailed summary of how the authorities will be used and the anticipated results.
- An explanation why the requested incentive(s) are an appropriate strategy for making the required workforce adjustments.
- The total number of employees expected to be affected and expected to take advantage of the incentive(s).
- Anticipated budget impact, i.e., direct costs and estimated savings
- Detailed list of positions that will be impacted and offered the incentive(s) identified by organizational unit, geographical location, occupational category, grade level and any other relevant factors.
- An explanation of how the organization will operate without the eliminated positions.
- Current and proposed organizational charts.

[DateTime]

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THINGS TO REMEMBER

- Use the instructions in the VERA/VSIP Checklist to develop your office's business case.
- Populate the Targeted Positions Excel template provided by OHR.
- Have a plan and be specific.
- Link justification to workforce and succession plans.
- If addressing "strategic goals" explain what those are.
- Don't use phrases that target age such as "maturing workforce."
- No requirement to request both VERA and VSIP.

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TARGETING POSITIONS

- Target positions, not employees.
- Do not target critical positions, required positions (e.g., Budget Officer) or direct hire positions (IT Security, Contract Specialists).
 - SES positions will require additional information (e.g., does the agency plan to return the slot?)
- Targeted positions must be restructured (different grade, series, duties) or eliminated if vacated via VERA/VSIP;
 - If the targeted position must remain in the same series and FPL, OPM will request current and proposed PDs and additional information to confirm restructure.
- Can't target positions for the sole purpose of providing promotional opportunities to remaining staff.



THE PROCESS

- In contrast to 2104/15 VERA/VSIP efforts, EPA will submit only one, agency-level VERA/VSIP business case proposal.
- Program/Region completes Targeted Positions Template and abbreviated, two-page business case based on parameters delineated in V/V Checklist. Office submissions will be compiled by OHR into one OMB/OPM submission.
- Offices submit draft to OARM/OHR for review and feedback.
- Informal review of agency-level proposal by OPM and OMB.
- Submit package for Acting AA of OARM's approval and signature.
- Submit officially to OPM and OMB.
- Receive Approval.



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**Office of Administration and Resources Management
Weekly Report
June 8, 2017**

Hot Issues

Space Allocation

OARM continues to identify opportunities to reduce and optimize its office, laboratory and warehouse space. In partnership with the regions and program offices agencywide, OARM is analyzing space utilization, recommending consolidation whenever feasible and thus reduce the agency's environmental footprint. This week, the Lab Enterprise workgroup briefed the Acting DA on progress and next steps.

VERA/VISP

The agency is continuing its agency-wide efforts to conduct a VERA/VISP in the coming months in partnership with its labor unions. OARM is in the process of reviewing the program and regional offices VERA/VISP business cases and will consolidate these into one agency-wide business case which will be submitted to the Office of Personnel Management and the Office of Management and Budget for approval within the next 10 days. Every program and region is participating

Ex. 5 - Deliberative Process

Ex. 5 - Deliberative Process

Next Steps: **Ex. 5 - Deliberative Process**

Ex. 5 - Deliberative Process

Ex. 5 - Deliberative Process OARM is preparing materials that programs and regional offices can use to communicate with their staff on VERA/VISP.

Upcoming Public Events

None

Upcoming Major Decisions

None

Last Week's Highlights

None

Message

From: Burbach, Joseph [burbach.joseph@epa.gov]
Sent: 6/12/2017 7:20:57 PM
To: Carpenter, Wesley [Carpenter.Wesley@epa.gov]
Subject: Proposals
Attachments: Restructure Proposals.docx

Wes

I believe you were going to identify some agency wide restructuring proposals. Providing the attached based on what I have collected thus far (will update in the morning based on any additional inputs received prior to COB).

Attached includes summary of OHR-specific proposals, some of which may carry over to the agency proposals. For your reference, includes discussion from recent leadership meeting while you were out.

Thanks

Joseph Burbach
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(202) 564-7783

To: Vizian, Donna[Vizian.Donna@epa.gov]
Cc: Gray, Linda[gray.linda@epa.gov]; Carpenter, Wesley[Carpenter.Wesley@epa.gov]; Hart, Debbi[Hart.Debbi@epa.gov]
From: Hunt, Loretta
Sent: Wed 7/12/2017 3:59:41 PM
Subject: Updated Workforce Reshaping Options Document
Workforce Reshaping Options 7-12-17.docx

Donna,

1. I removed the watermark.

2. **Ex. 5 - Deliberative Process**

3. **Ex. 5 - Deliberative Process**

4. **Ex. 5 - Deliberative Process**

Ex. 5 - Deliberative Process

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